



Customer Portal Quick Start Guide

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Login



QT9 Customer Portal Sign In

Don't have an account? [Click Here](#) 

[Registration Page Access.](#)

Username

Password

Sign In

Password:

On new accounts the password is auto generated. You will get an email with the password after completing the registration page.

On existing accounts after initial login, you will have a custom password that you have set up in the system.

Registration

If you do not have an account created in the QT9 Software Customer Portal. You will need to create an account from the [registration page](#). When you access this page, it will require you to enter in some information to validate who you are.

QT9 Customer Portal Registration

Already have an account? [Click Here](#)

First Name	John
Last Name	Doe
Email	JohnDoe@Test.com
Company	Test Inc.



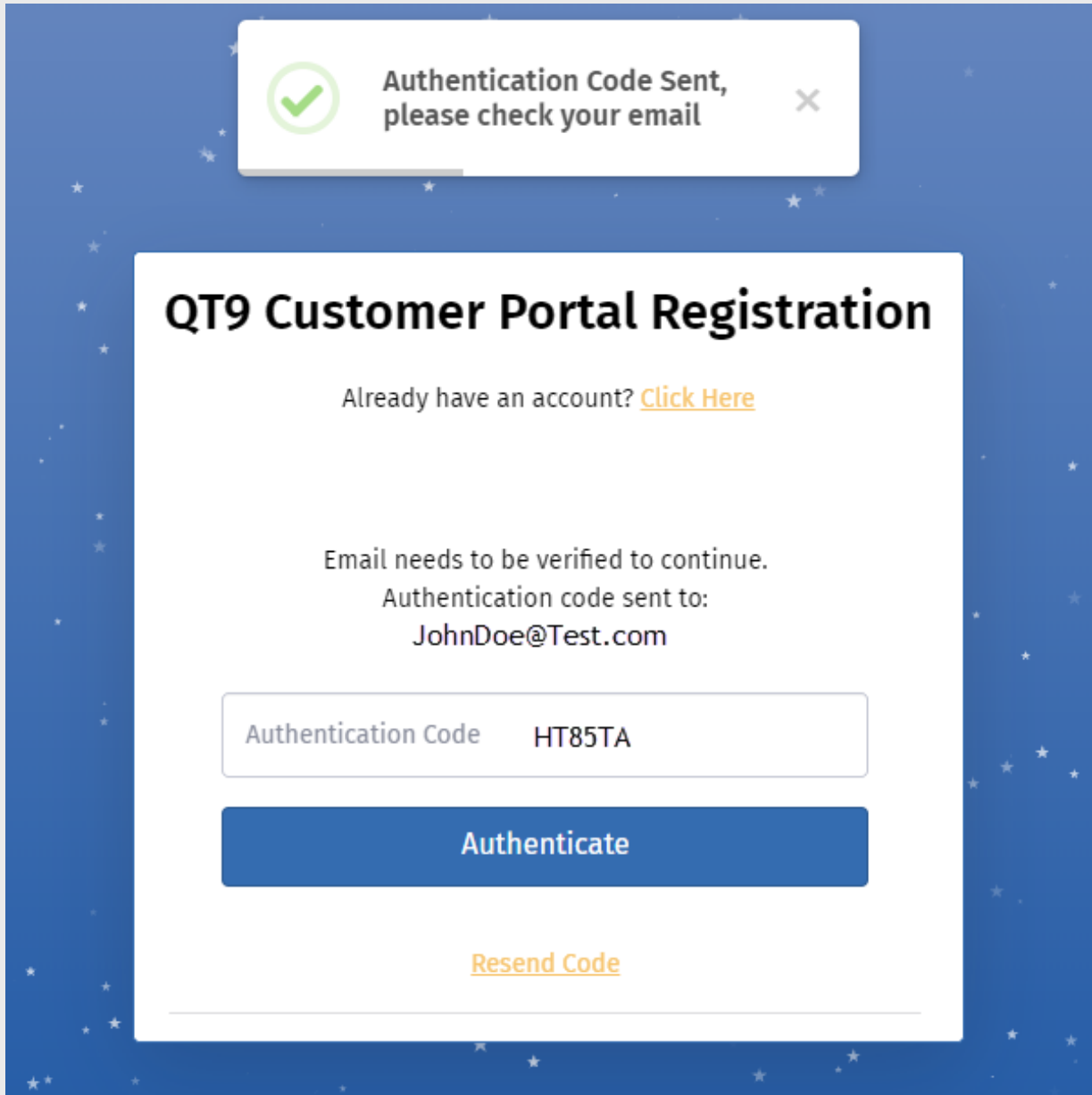
[Generate New Image](#)

KTUN

Type the code from the image

Register

After clicking the register button, and the page is validated. If your account is found you will be sent an email with an authorization code, enter the code in below to continue in the registration process. You can resend the code if you don't get the email, but the previous code will then be expired.



Authentication Code Sent, please check your email ✕

QT9 Customer Portal Registration

Already have an account? [Click Here](#)

Email needs to be verified to continue.
Authentication code sent to:
JohnDoe@Test.com

Authentication Code HT85TA

Authenticate

[Resend Code](#)

If your account was not found, you will see this screen below. Our team will get an email with the information you entered on the previous screen. They will then review the information and reach out to you once they verify the information you have entered is legitimate.

QT9 Customer Portal Registration

Already have an account? [Click Here](#)

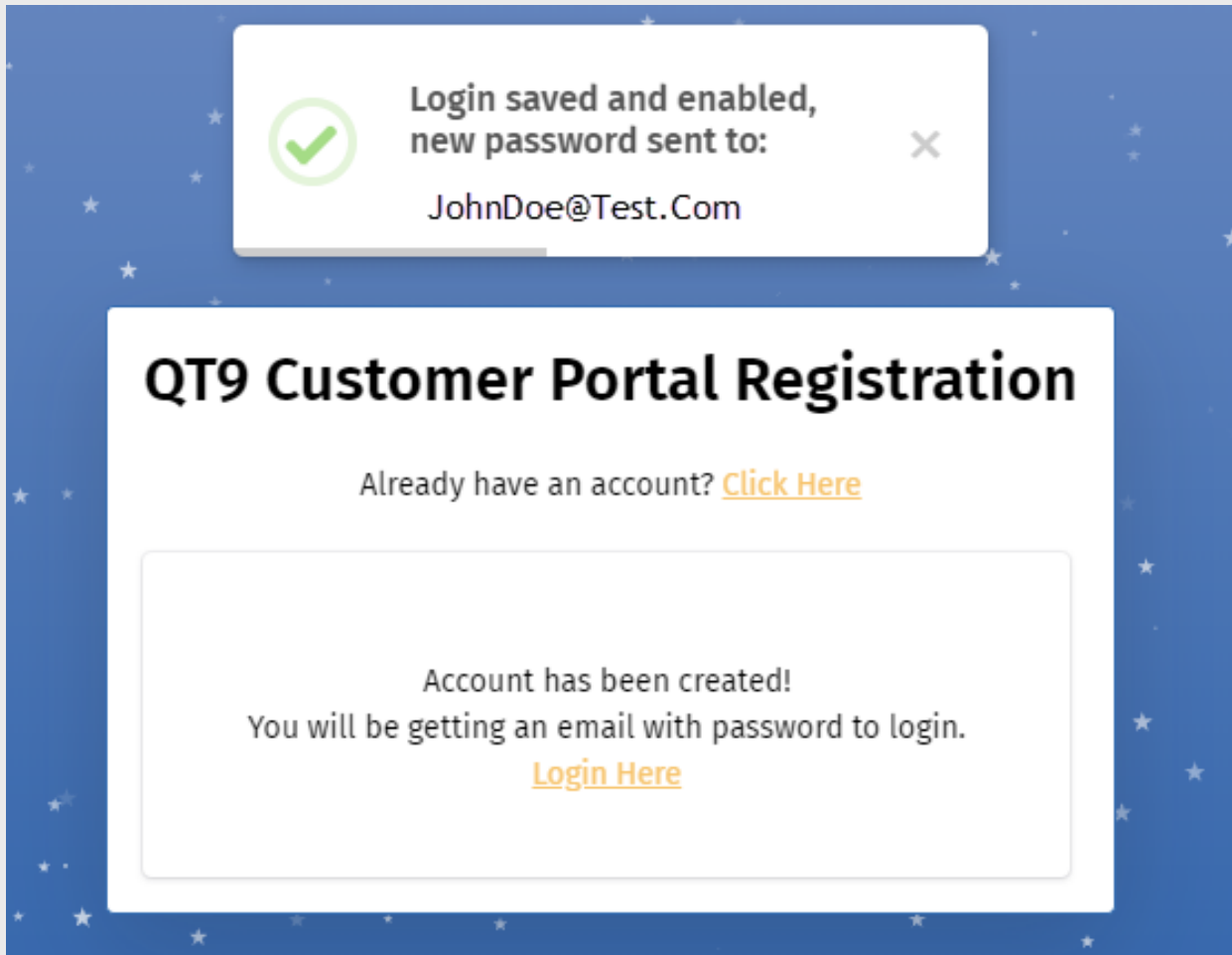
Your account was not found!

An email was sent to our support team to review the information you have entered. The support team will reach out to you after they validated your information.

[Go Back](#)

Once you have validated your email address, you will be sent one more email with a temporary password to login into the customer portal. You can then click the “Login Here” to go back to the customer portal login page and sign in.

- Username will be your email.
- Password will be your temporary password.



Body of Email with the password.

Below is your QT9 Customer Dashboard temporary password, login to change it.

csmeTHNQ503

On your first initial sign on after registering, you will be prompted to change your password. After you change your Password, you will be redirected to the customer portal dashboard.

Please change your password to continue.

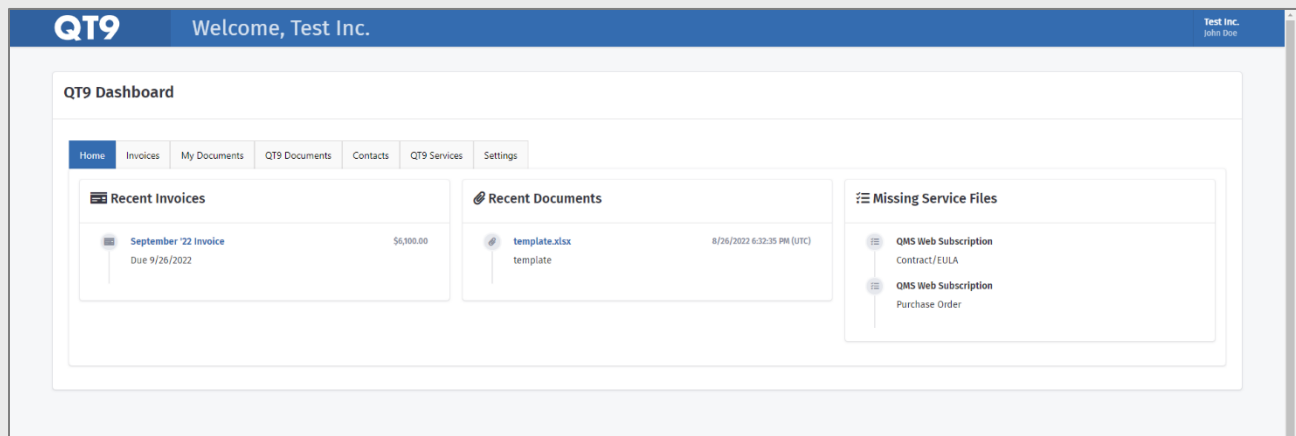


- At least 8 characters
- At least one special character
e.g., ! @ # ?]
- Uppercase and lowercase letters
- Letters and numbers

Change Password

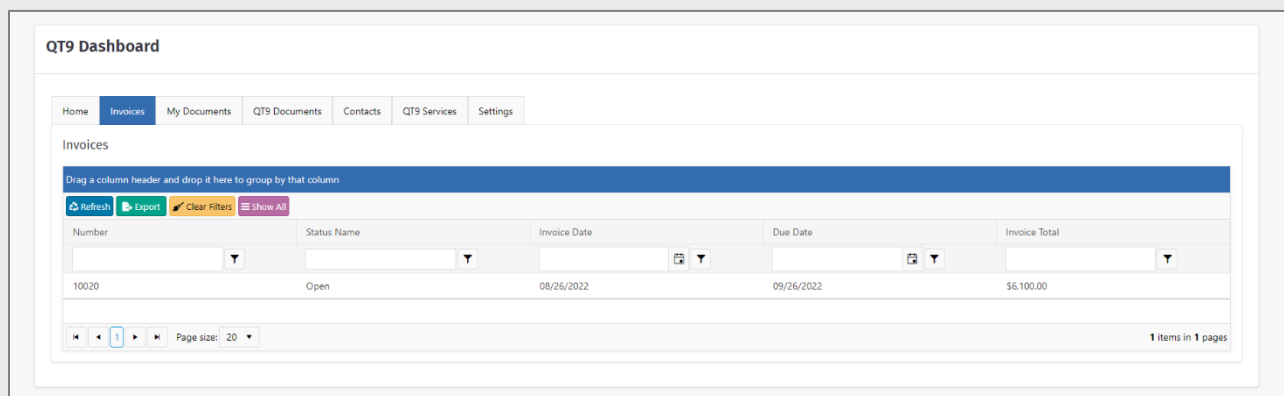
Dashboard

Once you login to the customer portal, you will see this dashboard. The default tab on login is the home tab. This tab will show all upcoming Invoices, any recent documents that QT9 has assigned to your organization and shows any files we need from your organization (EULA/PO).



The screenshot shows the QT9 Dashboard for 'Test Inc. John Doe'. The dashboard includes a navigation menu with tabs for Home, Invoices, My Documents, QT9 Documents, Contacts, QT9 Services, and Settings. The main content area is divided into three sections: 'Recent Invoices' showing a 'September '22 Invoice' for \$6,100.00 due on 9/26/2022; 'Recent Documents' showing a 'template.xlsx' document from 8/26/2022; and 'Missing Service Files' listing 'QMS Web Subscription' contracts and purchase orders.

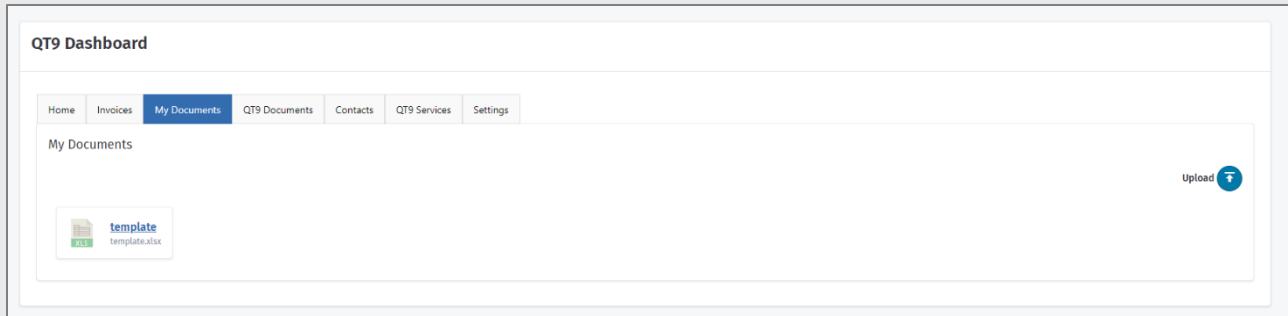
On the Invoices tab, you will see all invoices by QT9 Software. You can click into an invoice to see the details or print the invoice. Also, if the Invoice is Open you have the option to pay that invoice online through the customer portal now.



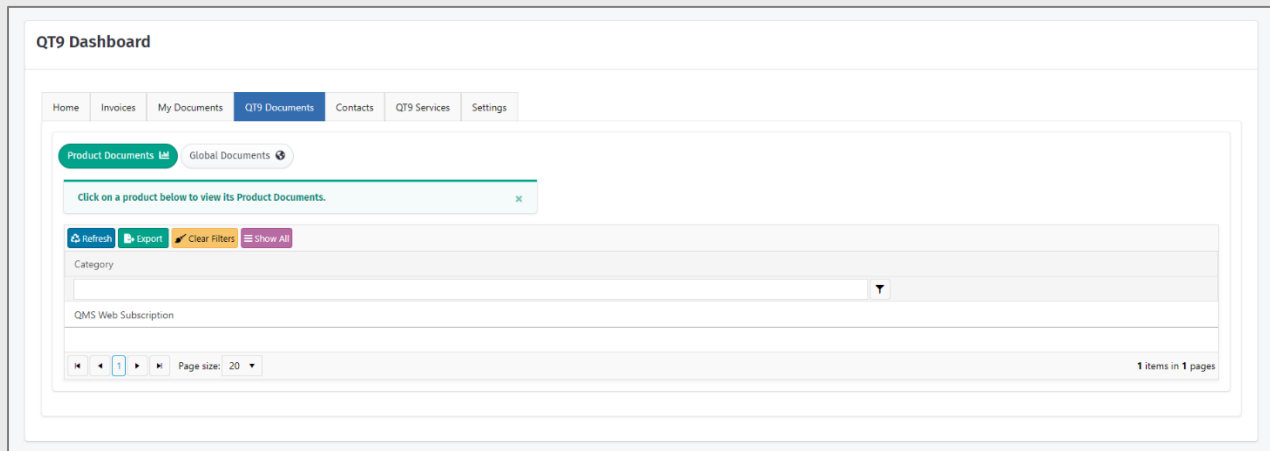
The screenshot shows the 'Invoices' tab in the QT9 Dashboard. It features a table with columns for Number, Status Name, Invoice Date, Due Date, and Invoice Total. The table contains one row for invoice number 10020, which is 'Open' and due on 09/26/2022 for a total of \$6,100.00. The interface includes a search bar, a 'Drag a column header and drop it here to group by that column' instruction, and action buttons for Refresh, Export, Clear Filters, and Show All. The page size is set to 20, and there is 1 item in 1 page.

Number	Status Name	Invoice Date	Due Date	Invoice Total
10020	Open	08/26/2022	09/26/2022	\$6,100.00

On the My Documents tab, you can upload files to the customer portal. Best use of this is uploading contacts or anything you will want QT9 Software to have access to.



On the QT9 Documents tab, QT9 will upload files for you to view. It is broken down by the product you own and all. Example of documents you will see here are



On the Contacts tab, you will see all Contacts we have for your organization. Here you can add new contacts or update existing contacts.

- Main Contact (can have more than one)
 - Contacts that will get alerts about any upcoming maintenance or information related to the product you own.
- AP Contact
 - Contact that will get all Emails with billing details.
- Technical Contact
 - Contact that manages any installation or schedule any technical related services.

QT9 Dashboard

Home Invoices My Documents QT9 Documents **Contacts** QT9 Services Settings

Contacts

Drag a column header and drop it here to group by that column

[New Contact](#)
[Refresh](#)
[Export](#)
[Clear Filters](#)
[Show All](#)

First Name	Last Name	Title	Biz Phone	Cell Phone	Address 1	Address 2	City	State	E-mail	Notes	Main	Technical Contact
John	Doe	Sir									<input checked="" type="checkbox"/>	<input type="checkbox"/>

Page size: 20 1 items in 1 pages

On the QT9 Services Tab, you will see all services you currently have. When you click on a service you can view its EULA/PO.

QT9 Dashboard

Home Invoices My Documents QT9 Documents Contacts **QT9 Services** Settings

Services

Drag a column header and drop it here to group by that column

[Refresh](#)
[Export](#)
[Clear Filters](#)
[Show All](#)

Product Name	Date Start	Date End	Service Type	Users	Total Cost
QMS Web Subscription	08/26/2022	08/26/2023	Annual	1	\$1,600.00

Page size: 20 1 items in 1 pages

On the Settings tab, you can edit your Companies address that we have on record, as well as manage what contacts can login into the customer portal.

Home Invoices My Documents QT9 Documents Contacts QT9 Services **Settings**

Settings

My Company Address

Address 1 Required Address 2 Address 3 City Required State Required ZIP/Postal Required Country Required

Address 1 Aurora United States of America **Save**

System Access

Login Contact Username (E-mail)

-- Please Select -- **Add Login**

Company contacts are shown here.

Drag a column header and drop it here to group by that column

Disable All
 Refresh
 Export
 Clear Filters
 Show All

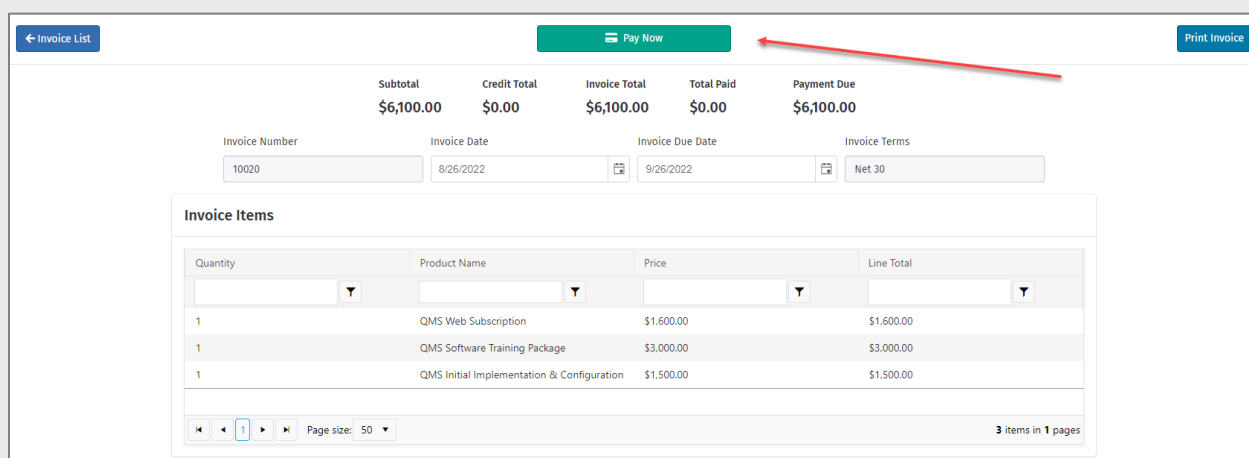
Username	Can Login	Date Entered	Full Name	E-mail
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input checked="" type="checkbox"/>	08/26/2022	John Doe	

Page size: 20 1 items in 1 pages

How to pay an Invoice Online

QT9 Software has created an online portal for you to pay your invoices here are the step you can take to make a successful payment.

Click an Invoice on the invoice tab, if the invoice is not paid you will see a green button on the top of the page. Click the button to pay the invoice or click the print invoice button to reprint the invoice.



The screenshot shows the invoice payment interface. At the top left is a button labeled "Invoice List". In the center, there is a green "Pay Now" button with a red arrow pointing to it. To the right is a "Print Invoice" button. Below these buttons is a summary table:

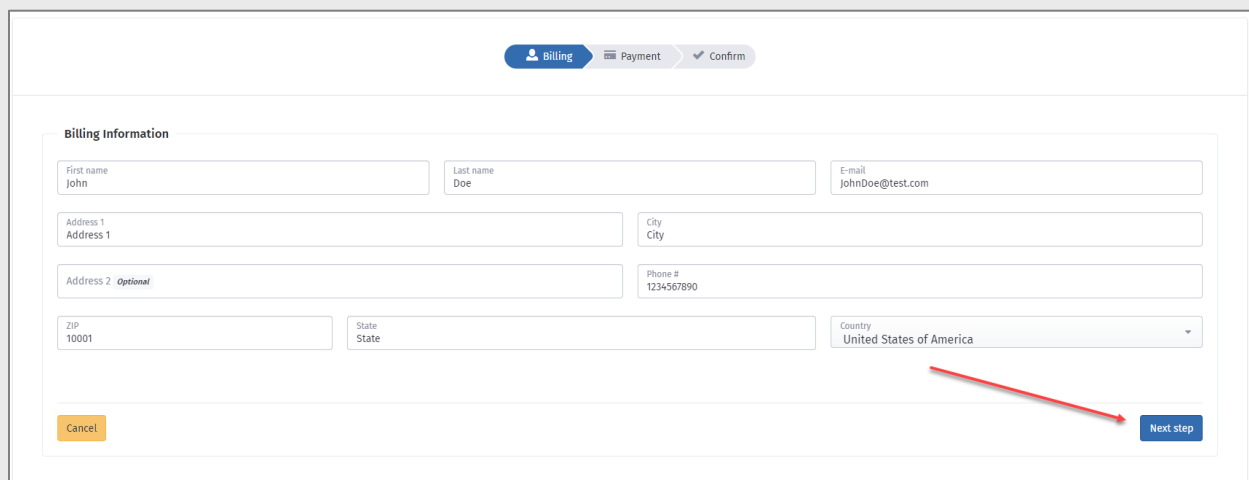
Subtotal	Credit Total	Invoice Total	Total Paid	Payment Due
\$6,100.00	\$0.00	\$6,100.00	\$0.00	\$6,100.00

Below the summary table are input fields for Invoice Number (10020), Invoice Date (8/26/2022), Invoice Due Date (9/26/2022), and Invoice Terms (Net 30). The main section is titled "Invoice Items" and contains a table:

Quantity	Product Name	Price	Line Total
1	QMS Web Subscription	\$1,600.00	\$1,600.00
1	QMS Software Training Package	\$3,000.00	\$3,000.00
1	QMS Initial Implementation & Configuration	\$1,500.00	\$1,500.00

At the bottom of the "Invoice Items" section, there are navigation arrows, a page size dropdown set to 50, and a note that says "3 items in 1 pages".

Once you click pay now, the payment processing wizard will start. Step 1 will be to fill out your billing address.

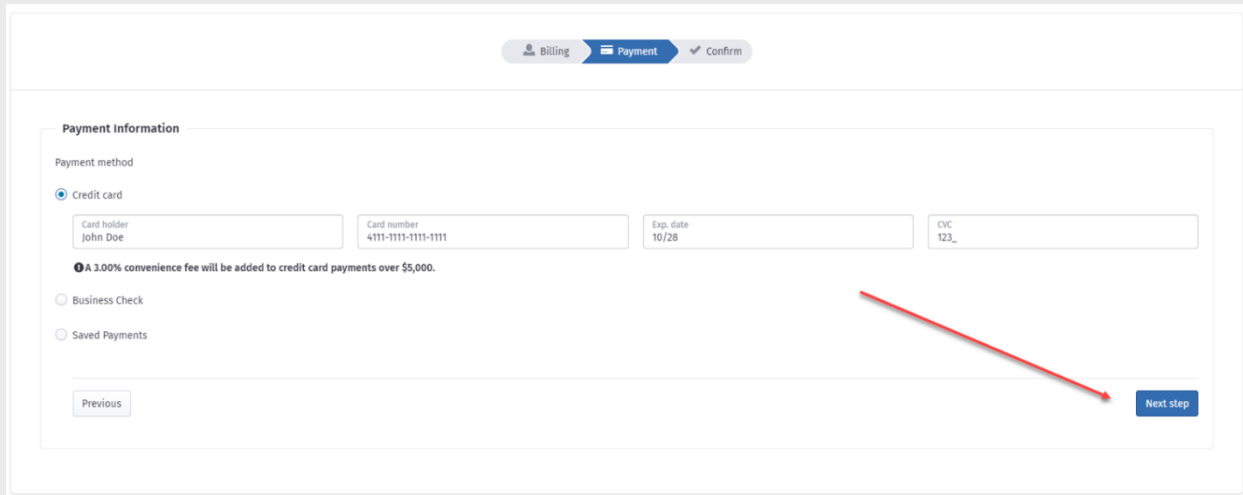


The screenshot shows the "Billing Information" step of the payment processing wizard. At the top, there are three tabs: "Billing" (selected), "Payment", and "Confirm". The "Billing Information" section contains several input fields:

- First name: John
- Last name: Doe
- E-mail: JohnDoe@test.com
- Address 1: Address 1
- City: City
- Address 2 (Optional):
- Phone #: 1234567890
- ZIP: 10001
- State: State
- Country: United States of America

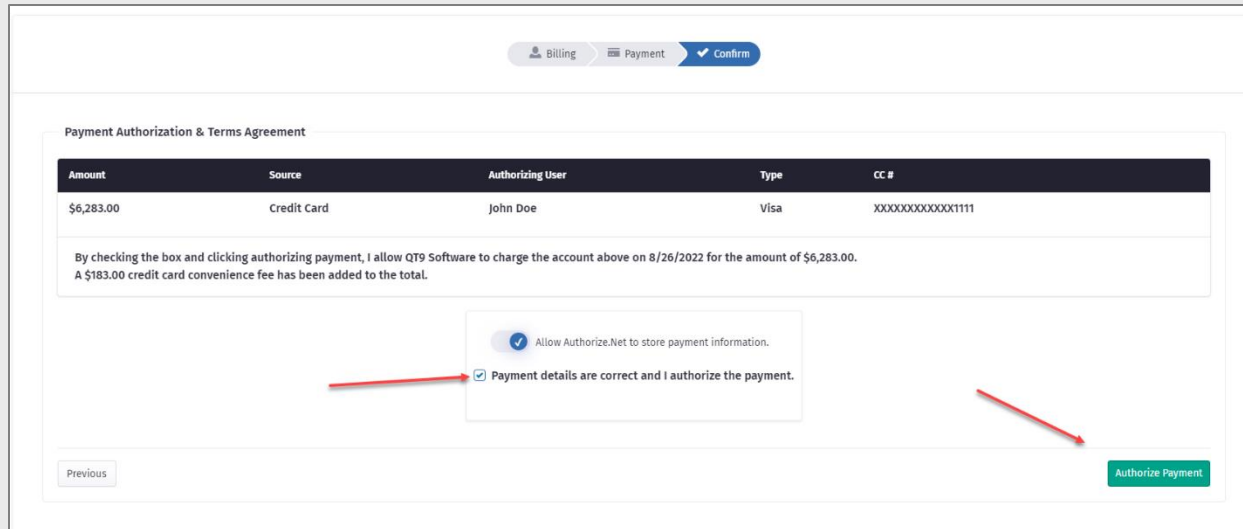
At the bottom left is a "Cancel" button, and at the bottom right is a "Next step" button with a red arrow pointing to it.

On the payment processing section, you can pay with either E-Check or Credit Card. Enter in your payment information and continue to the next step.



The screenshot shows the 'Payment Information' section of a payment processing interface. At the top, there are three tabs: 'Billing', 'Payment' (which is active), and 'Confirm'. Below the tabs, the 'Payment Information' section is titled. Under 'Payment method', there are three radio button options: 'Credit card' (selected), 'Business Check', and 'Saved Payments'. The 'Credit card' section contains four input fields: 'Card holder' (with the value 'John Doe'), 'Card number' (with the value '4111-1111-1111-1111'), 'Exp. date' (with the value '10/28'), and 'CVC' (with the value '123_'). Below these fields, a note states: 'A 3.00% convenience fee will be added to credit card payments over \$5,000.' At the bottom of the form, there are two buttons: 'Previous' on the left and 'Next step' on the right. A red arrow points from the right side of the form towards the 'Next step' button.

On the final step, summary of the invoice. Where you will then click authorize payment to process the payment.



The screenshot shows the 'Payment Authorization & Terms Agreement' section of the payment processing interface. At the top, there are three tabs: 'Billing', 'Payment', and 'Confirm' (which is active). Below the tabs, the 'Payment Authorization & Terms Agreement' section is titled. It features a table with the following data:

Amount	Source	Authorizing User	Type	CC #
\$6,283.00	Credit Card	John Doe	Visa	XXXXXXXXXXXX1111

Below the table, there is a text block: 'By checking the box and clicking authorizing payment, I allow QT9 Software to charge the account above on 8/26/2022 for the amount of \$6,283.00. A \$183.00 credit card convenience fee has been added to the total.' Below this text, there are two checkboxes: 'Allow Authorize.Net to store payment information.' (checked) and 'Payment details are correct and I authorize the payment.' (checked). At the bottom of the form, there are two buttons: 'Previous' on the left and 'Authorize Payment' on the right. Two red arrows point towards the 'Authorize Payment' button.

Once the payment is processed you will see that the pay now button is gone, and a payment has been logged in the table below.

Subtotal	Credit Total	Invoice Total	Total Paid	Payment Due
\$6,283.00	\$0.00	\$6,283.00	\$6,283.00	\$0.00

Invoice Number: 10020 Invoice Date: 8/26/2022 Invoice Due Date: 9/26/2022 Invoice Terms: Net 30

Invoice Items

Quantity	Product Name	Price	Line Total
1	QMS Web Subscription	\$1,600.00	\$1,600.00
1	QMS Software Training Package	\$3,000.00	\$3,000.00
1	QMS Initial Implementation & Configuration	\$1,500.00	\$1,500.00
1	Credit Card Fee	\$183.00	\$183.00

4 items in 1 pages

Payments

Payer	Type	Check Number	Credit Card #	Payment Date	Payment Amount
John Doe	Credit Card		1111	08/26/2022	\$6,283.00

1 items in 1 pages

Whitelist

- Customers.qt9software.com
- Emails from any email with domain of @QT9Software.com